Power BI Visualization Guide

1. Donut Chart - Percentage of Exited vs Retained Customers

- Steps:

- 1. Go to Report View.

- 2. Select Donut Chart from the Visualizations pane.

- 3. Set up the fields:

-     - Values: Count of CustomerId

-     - Legend: Exited (Yes/No) - Ensure binary values are converted to labels.

- 4. Format:

-     - Turn on Data Labels.

-     - Set Donut Hole Size to around 40% for better visibility.

2. Stacked Column Chart - Churn Rate by Geography

- Steps:

- 1. Select Stacked Column Chart.

- 2. Set up the fields:

-     - X-axis: Geography

-     - Y-axis: Count of CustomerId

-     - Legend: Exited (Yes/No)

- 3. Format:

-     - Add Data Labels.

-     - Customize colors to distinguish exited and retained.

3. Histogram - Credit Score Distribution

- Steps:

- 1. Select Histogram.

- 2. Set up the fields:

-     - X-axis: Credit Score

-     - Y-axis: Count of CustomerId

- 3. Format:

-     - Adjust bin size for better clarity (e.g., 10 or 20).

-     - Enable Data Labels.

4. Scatter Plot - Balance vs Credit Score

- Steps:

- 1. Select Scatter Plot.

- 2. Set up the fields:

- - X-axis: Credit Score

- - Y-axis: Balance

- - Legend: Exited (Yes/No)

- 3. Format:

- - Adjust marker size for better visibility.

- - Use different colors for exited vs retained.

5. Clustered Column Chart - Customer Retention by Age Group

- Steps:

- 1. Create an Age Group column in Power Query:

- - 18-30: 'Young'

- - 31-45: 'Adult'

- - 46-60: 'Middle-aged'

- - 61+: 'Senior'

- 2. Select Clustered Column Chart.

- 3. Set up the fields:

- - X-axis: Age Group

- - Y-axis: Count of CustomerId

- - Legend: Exited

- 4. Format:

- - Adjust bar width for better spacing.

6. Stacked Bar Chart - Churn by Number of Products

- Steps:

- 1. Select Stacked Bar Chart.

- 2. Set up the fields:

- - X-axis: Number of Products

- - Y-axis: Count of CustomerId

- - Legend: Exited (Yes/No)

- 3. Format:

- - Adjust bar height.

- - Add Data Labels.

7. Stacked Bar Chart - Active Members and Churn Rate

- Steps:

- 1. Select Stacked Bar Chart.

- 2. Set up the fields:

- - X-axis: Active Member

- - Y-axis: Count of CustomerId

-   - Legend: Exited (Yes/No)

- 3. Format:

-   - Adjust colors for clarity.

8. Stacked Column Chart - Balance Status vs Geography

- Steps:

- 1. Create a Balance Status column in Power Query:

-   - If Balance = 0: 'Zero Balance'

-   - If Balance > 0: 'Active Balance'

- 2. Select Stacked Column Chart.

- 3. Set up the fields:

-   - X-axis: Geography

-   - Y-axis: Count of CustomerId

-   - Legend: Balance Status

- 4. Format:

-   - Use distinct colors for 'Zero Balance' and 'Active Balance'.

9. Scatter Plot - Correlation Between Credit Score and Age

- Steps:

- 1. Select Scatter Plot.

- 2. Set up the fields:

-   - X-axis: Age

-   - Y-axis: Credit Score

-   - Legend: Exited (Yes/No)

- 3. Format:

-   - Adjust marker size.

-   - Enable Data Labels if needed.

10. Clustered Bar Chart - Gender-Based Churn Rate

- Steps:

- 1. Select Clustered Bar Chart.

- 2. Set up the fields:

-   - X-axis: Gender

-   - Y-axis: Count of CustomerId

-   - Legend: Exited (Yes/No)

- 3. Format:

-   - Adjust bar width.

-   - Enable Data Labels.